

Readiness Checklist for Purchaser Organizations

What does readiness look like?

On the purchasing side:

- The Organization Administrator has set up approval paths to ensure that requisitions are properly approved, converted to POs and sent to the vendor
- Those on staff making simple catalog purchases (for example, ordering office supplies) are familiar with the ordering process, know how to search for items in catalogs, and have login access to COMMBUYS
- Those on staff needing to collect quotes prior to purchase understand the Open Market Requisition process and have login access to COMMBUYS
- Procurement staff understand how to prepare and post a bid and can manage the lifecycle of the bid online
- Contract administrators have enabled their Departmental contracts in COMMBUYS
- Departmental bill to and ship to addresses

Readiness in Detail

What?	How?	Resources
Users and approvals paths are set-up in COMMBUYS	Organization Administrator has attended training and completed necessary COMMBUYS set-up tasks: <ul style="list-style-type: none"> • Departments and Locations are specified • Bill to / Ship to addresses • Approval paths are specified • Users have been added and assigned appropriate roles Dependency: Organization Administrators understand user roles in COMMBUYS and how to tailor roles to specific user needs and appropriate levels of access.	<ul style="list-style-type: none"> ✓ Organization Administrator instructor-led training classes ✓ Drop-in sessions ✓ Job Aids ✓ Department Readiness Team support
Departmental contracts are set up in COMMBUYS	Designated contract administrators have Basic Purchaser access to COMMBUYS and have: <ul style="list-style-type: none"> • Created Master Blanket POs for their Departmental Contacts, either from migrated Comm-PASS data or from scratch • vendors and catalog types have been associated with each Departmental contract Dependency: Departmental contract vendors need to be registered in COMMBUYS in order for Departments to complete the contract set-up process and use the contracts-	<ul style="list-style-type: none"> ✓ Job Aids (2) for Master Blanket PO enablement in COMMBUYS ✓ Department Readiness Team support
Department personnel can initiate purchases	Staff have been assigned the appropriate user role by their Organization Administrator and are able to: <ul style="list-style-type: none"> • Initiate a Requisition, either for a catalog purchase or to request quotes • Search for items • Complete a Requisition and submit it for approval • Make sure the PO is sent to the vendor 	<ul style="list-style-type: none"> ✓ Purchasing instructor-led training ✓ Job Aids ✓ Webcasts ✓ Help Desk ✓ General Purchasing Overview sessions and 6/13 ✓ Department Readiness Team support ✓
Procurement staff	Staff have been assigned the appropriate user role by	✓ Procurement instructor-led

What?	How?	Resources
can manage bids	<p>their Organization Administrator and are able to:</p> <ul style="list-style-type: none"> • Create a Bid-enabled Requisition (either cloned from a previous bid or from scratch) • Set up the online evaluation process • Accept quotes online • Review and score bids online • Award online and create PO 	<p>training</p> <ul style="list-style-type: none"> ✓ Job Aids ✓ Webcasts ✓ Help Desk ✓ Department Readiness Team support
Purchase Order review and approval happens in a timely way	<p>Approvers have been assigned the appropriate user role and permissions and know how:</p> <ul style="list-style-type: none"> • To used their dashboard to find documents awaiting their approval, and • Know how to approve or disapprove documents 	<ul style="list-style-type: none"> ✓ Purchasing instructor-led training ✓ Job Aids ✓ Webcasts ✓ Help Desk ✓ Department Readiness Team support
Department staff are proficient at searching in COMMBUYS	<p>The Advanced Search function in COMMBUYS can be a powerful tool to:</p> <ul style="list-style-type: none"> • Search for contracts • Search for items and services on contracts • Search for vendors • Search for bids <p>Key word search capabilities enable searching on any term in the COMMBUYS system.</p>	<ul style="list-style-type: none"> ✓ Drop-in Sessions ✓ Job Aids ✓ Webcasts ✓ Help Desk ✓ Department Readiness Team support ✓ Webinars (as scheduled)